UC RIVERSIDE
Occupational Health

Occupational Health Surveillance System

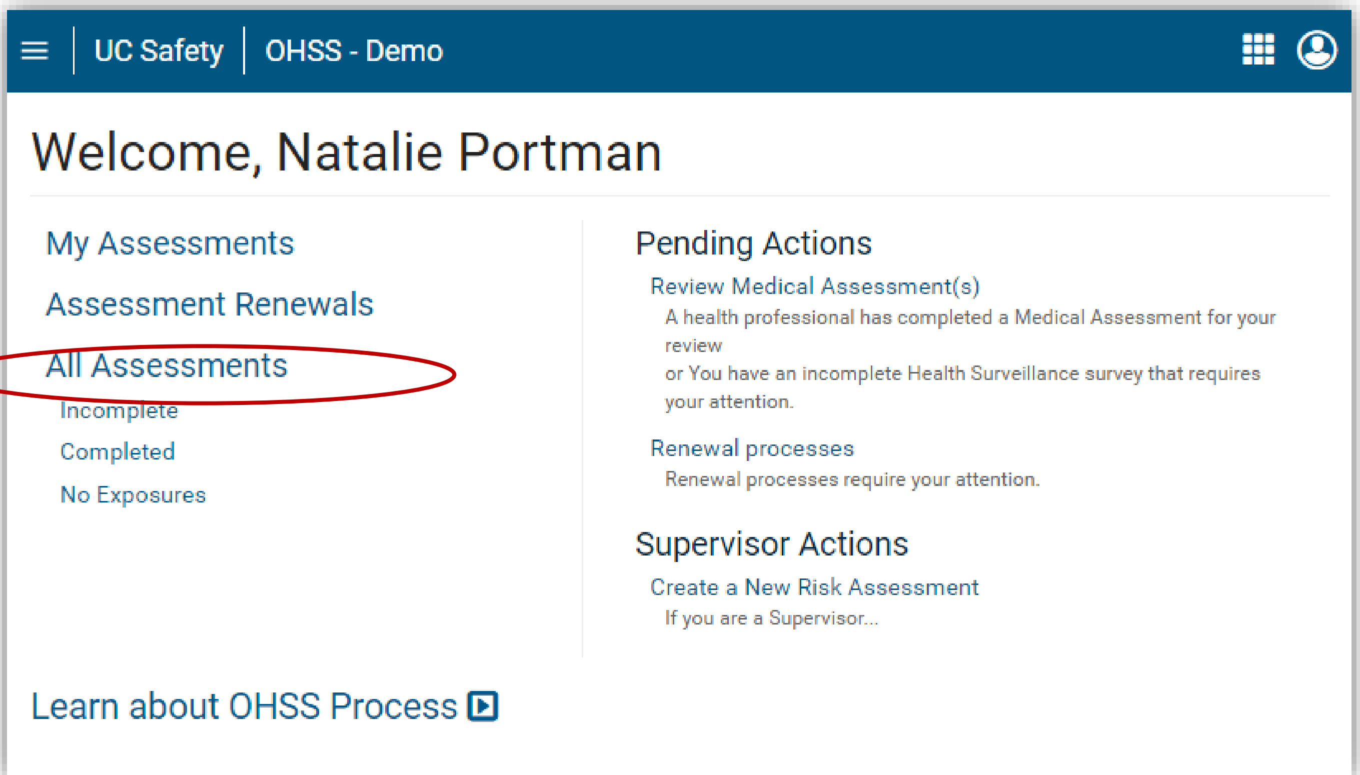
November 26, 2024

PI’s Copying a Risk Assessment

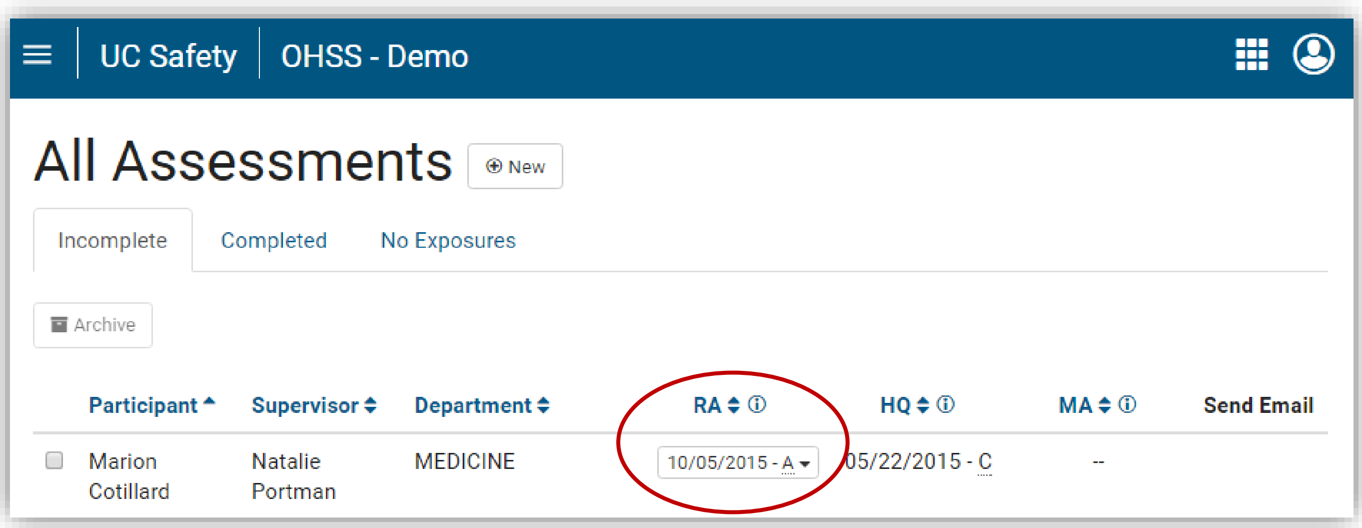
Copying a Risk Assessment from an Existing One

Copying an existing Risk Assessment allows PIs to quickly create multiple assessments with similar hazards and risks. Follow these steps to copy a Risk Assessment:

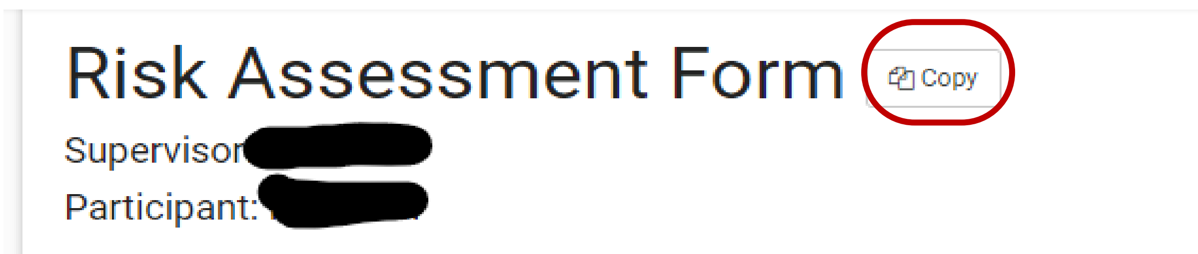
1. **Navigate to All Assessments:**
   - From the homepage, go to **All Assessments**.



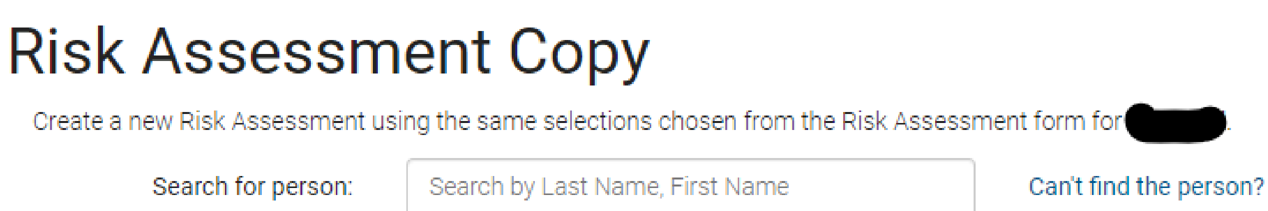
2. **Locate the Existing Assessment:**
   - In the **RA** column, find the name of the participant whose Risk Assessment you want to copy.



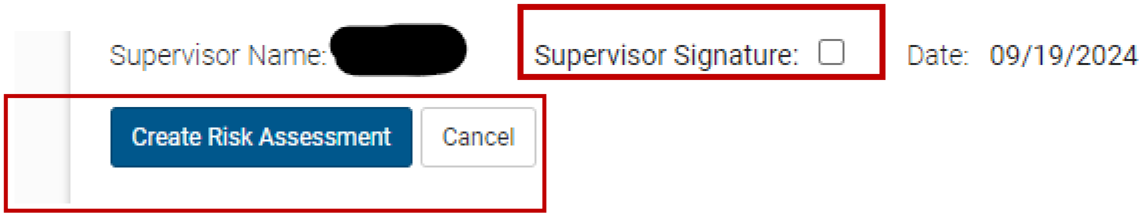
3. **Access the Copy Option:**
   - Click the drop-down arrow next to the participant's name.
   - Select **Copy Risk Assessment** from the options.



4. **Search for the New Participant:**
   - Enter the name of the person (in the format **Last Name, First Name**) to whom the Risk Assessment will be applied.
   - Select the participant from the list.



5. **Edit and Finalize the Assessment:**
   - Review the copied Risk Assessment and make any necessary edits.
   - The PI must electronically sign by selecting the "**Supervisor's Signature"** checkbox. This action confirms that the information provided is accurate.
   - Click the **Create Risk Assessment** button to complete the process.



Participant Review

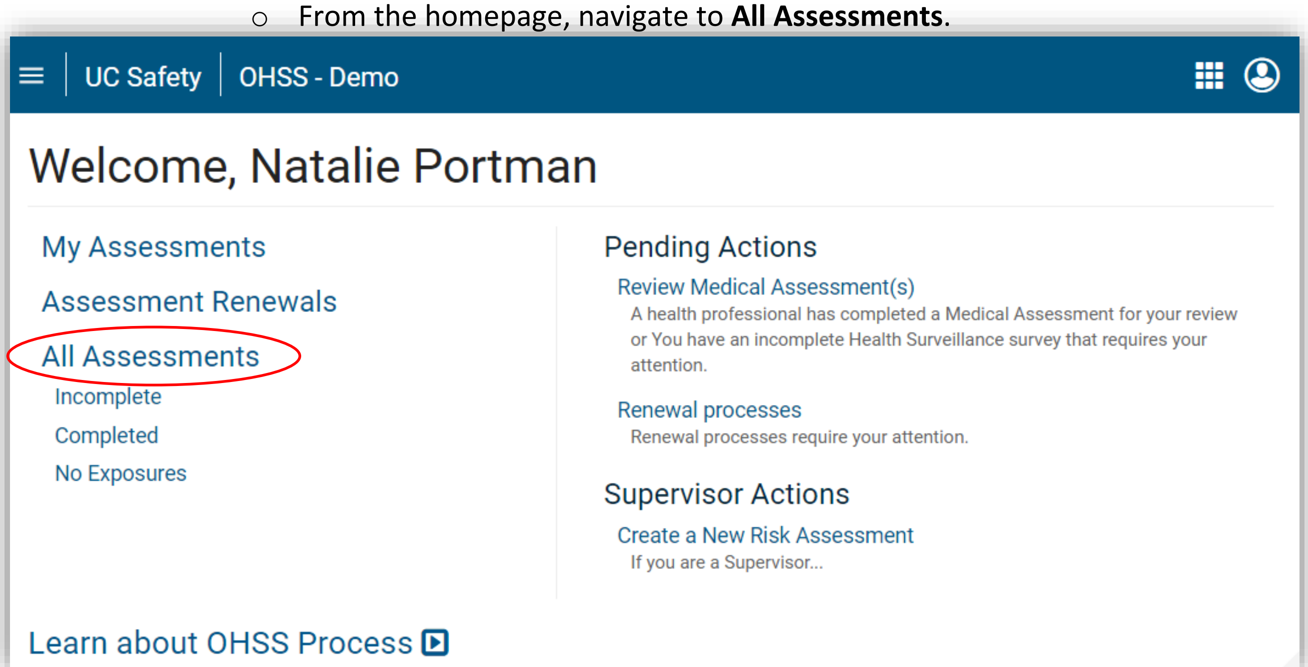
Once the Risk Assessment is created, it is ready for the participant's review.

- The system allows the PI to send a pre-drafted email to the participant with instructions.
- A customizable text box in the email allows PIs to add specific details or notes

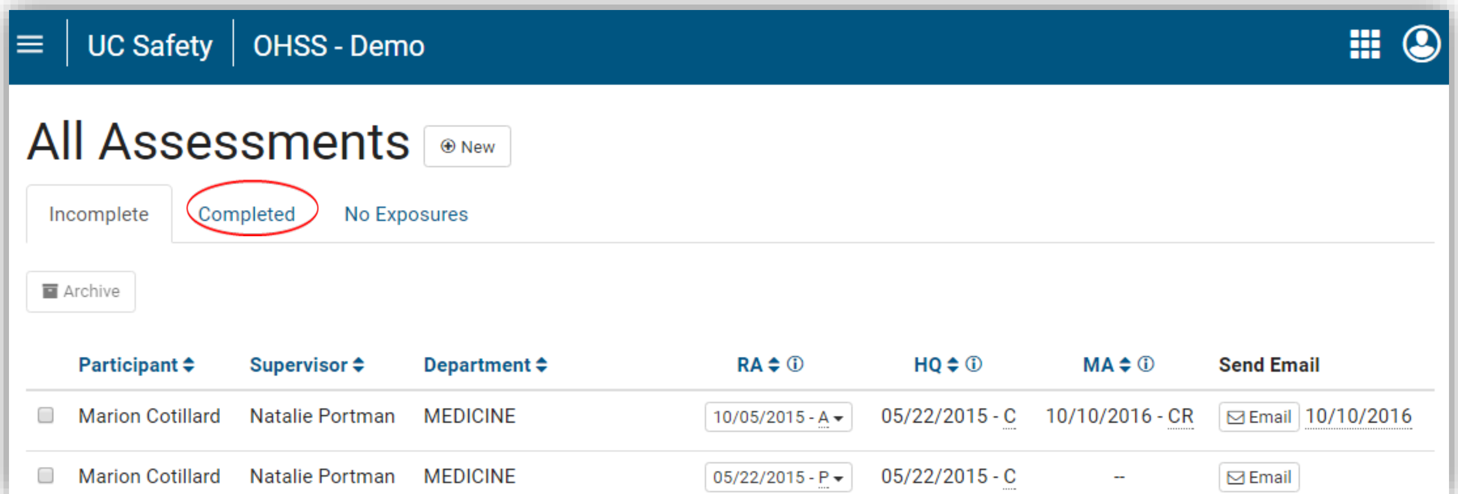
Viewing a Participant's Status

PIs can track a participant's progress in the Health Surveillance process without accessing Protected Health Information. Only the status of the Health Questionnaire (HQ) or Medical Assessment (MA) will be visible.

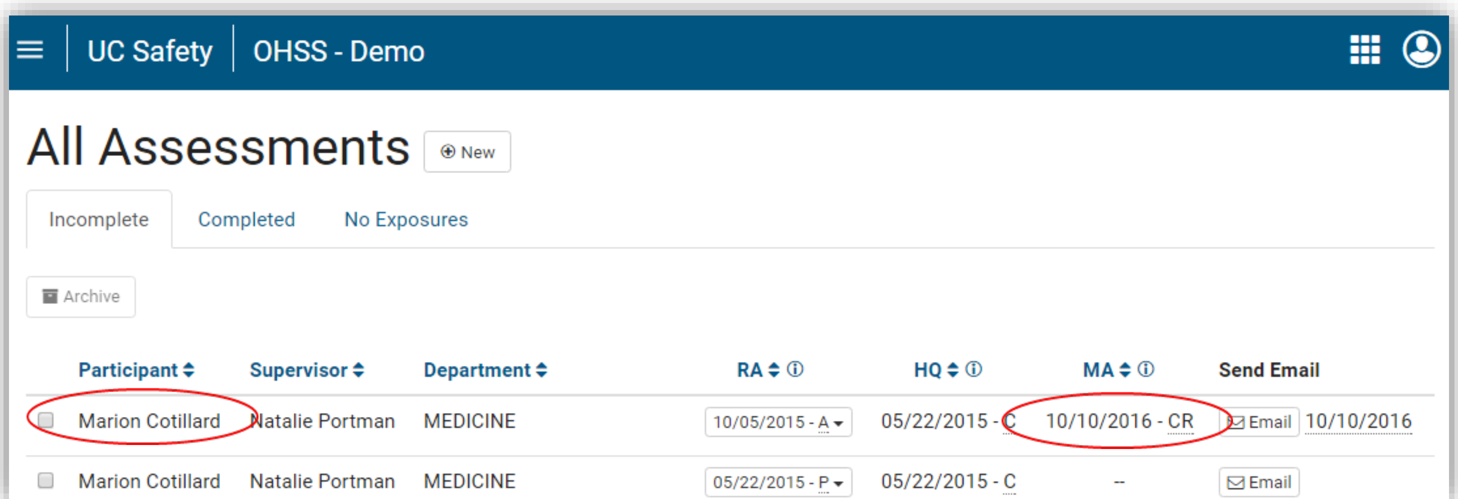
1. **Go to All Assessments:**
   - From the homepage, navigate to **All Assessments**.



2. **View Status:**
    - By default, you will land on the **Incomplete** tab, showing participants who have not completed the process.
    - To view completed assessments, switch to the **Completed** tab.



3. **Locate the Participant:**
    - Use column headers to sort the data as needed.
    - Hover over the letter next to the date to check the status of the Risk Assessment (RA), Health Questionnaire (HQ), or Medical Assessment (MA).



4. **Send Reminders:**
    - If action is needed, click the **Email** button on the far right to resend the last notification.
    - A new tab will open, allowing you to add notes to the email before sending.
    - The participant will receive an email prompting them to complete the necessary steps.